DOCUMENT RESUME

ED 399 612 EA 027 844

AUTHOR Marotta, Sylvia A.; Jennings, Leilani
TITLE Gathering Together: A Guidebook for Forming and Developing Associations.
INSTITUTION National Catholic Educational Association, Washington, D.C.
REPORT NO ISBN-1-55833-167-0
PUB DATE 96
NOTE 48p.
AVAILABLE FROM National Catholic Educational Association, 1077 30th Street, N.W., Suite 100, Washington, DC 20007 ($9 members; $12 nonmembers).
PUB TYPE Guides - Non-Classroom Use (055)

EDRS PRICE MF01/PC02 Plus Postage.
DESCRIPTORS *Catholic Schools; Elementary Secondary Education; Interprofessional Relationship; *Leadership; Leadership Training; Organizational Communication; *Partnerships in Education; *Professional Associations; Strategic Planning

ABSTRACT

Making an association of Directors of Religious Education (DREs) involves complex decisions that lead to complex actions. This guidebook describes a process for building lasting associations, the goal of which is to organize people around a common purpose. Following the introduction, chapters 2 through 5 outline stages of the process: identify leadership and environmental relationships; plan the first dream session; assess and distribute results of the first session; plan the second dream session; identify leaders for the new association; convene the new association; and move the association forward. Appendices contain selected readings regarding church teachings on associations, sample stories of other DREs, a list of desirable leadership qualities, an installation-of-leaders ritual, guidelines to consider in deciding about the business aspect of association management, and questions for assessing interorganizational evaluation and commitment. (Contains seven references.) (LMI)

****
* Reproductions supplied by EDRS are the best that can be made *
* from the original document. *
****

EH

NATIONAL CATHOLIC EDUCATIONAL ASSOCIATION

ED 399 512

GATHERING TOGETHER

A Guidebook for Forming and Developing Associations

by
Sylvia A. Marotta, Ph.D.
and Leilani Jennings, Ph.D.

U.S. DEPARTMENT OF EDUCATION
Office of Educational Research and Improvement
EDUCATIONAL RESOURCES INFORMATION CENTER (ERIC)
☑ This document has been reproduced as received from the person or organization originating it.
☐ Minor changes have been made to improve reproduction quality.
• Points of view or opinions stated in this document do not necessarily represent official OERI position or policy.

"PERMISSION TO REPRODUCE THIS MATERIAL HAS BEEN GRANTED BY
P. Kohus
TO THE EDUCATIONAL RESOURCES INFORMATION CENTER (ERIC)."

EA 027 844

BEST COPY AVAILABLE

GATHERING TOGETHER

A Guidebook for Forming and Developing Associations

by
Sylvia A. Marotta, Ph.D.
and
Leilani Jennings, Ph.D.

Copyright 1996 by the National Catholic Educational Association, Washington DC. All rights reserved, including the right to reproduce in whole or in part in any form. Printed in the United States by the National Catholic Educational Association.
ISBN 1-55833-167-0

TABLE OF CONTENTS

Acknowledgments v
About the Authors vi
Introduction vii

Chapter 1 Gatherings and Other Beginnings 1
What the Process Looks Like 2

Chapter 2 Who Will Be Leaders 3
Leadership Skills 4
Clarifying a Fundamental Relationship 4
Evaluating Environmental Support 5
Facilitating Factors 5
Factors that Hinder 6
Support of Other Experienced People 6

Chapter 3 Planning the First Dream Session 9
Participants 10
Process for the Dream Session 10
Content of the Dream Session 11
Dream Session Results 11

Chapter 4 Leadership for the New Association 13
Leaders for the New Association 13
Conceptualizing a Structure 14
Leader Competencies 14
Size of Leadership Body 15
Communication Within the Leadership Body 16
Tasks of the New Leaders 16
The Person of the Leader 17
Leadership Development 17
Integrating New Members 18
Reflections for Prospective Leaders 19

Chapter 5 An Association is Born 23
Roles and Responsibilities of Associations 23
Moving Forward 24
Making a Difference 25
Outside Support 25

Conclusion 27

Appendix One The Church as Employer: Social Teachings 29
Appendix Two Association Stories 31
Appendix Three Qualities of Leadership Persons 35
Appendix Four Installation of Leaders Ritual 37
Appendix Five Associations, Inc. 39
Appendix Six Interorganizational Evaluation and Commitment 41

References 45

BEST COPY AVAILABLE

ACKNOWLEDGMENTS

Gathering Together: A Guidebook for Forming and Developing Associations is the result of many hours of discussions and meetings on the part of the entire National Association for Parish Coordinators and Directors of Religious Education, its members, its executive committee and especially its authors, Leilani Jennings, Ph.D. and Sylvia Marotta, Ph.D.

Much of the text's development had already been completed by the time the NPCD executive committee asked that I coordinate its final draft with Sylvia and Leilani. In doing so, we are grateful to Sr. Loretta Primus, DRE, St. Mary of the Mills Parish, Laurel, MD; Jean Krimm, DRE, Our Lady of Mt. Carmel Parish, Newport News, VA and Mary Poffenbarger, DRE, St. Joseph-on-Carrollton Manor, Buckeystown, MD for the insight and recommendations they provided while serving as ad hoc committee members.

At the National Catholic Educational Association, Phyllis Kokus, Cecelia Edwards and Tia Gray gave wonderful encouragement and excellent editorial suggestions regarding the content, format and graphics in the text.

This guidebook would never have materialized without the commitment and personal leadership of Leilani Jennings and Sylvia Marotta who while serving as NPCD presidents began the initial sketches of the current text. Since their terms of leadership both Sylvia and Leilani have gone on to obtain doctorates in the field of education. On behalf of the National Catholic Educational Association and the National Association for Parish Coordinators and Directors of Religious Education, I am most thankful for the hard work and organizational insights that they brought to the development and completion of the text.

May it serve as a helpful resource in creating associations that call its members to excellence at the service of God's Kingdom.

Robert Colbert
Executive Director
Department of Religious Education
NCEA

Sylvia A. Marotta is assistant professor of counseling at the George Washington University, Washington, DC. She is Director of the Counseling Laboratory at GWU and is a licensed psychologist. She received her masters and doctoral degrees in counseling psychology from the University of Houston. She was a parish DRE for 13 years and served as president of the NPCD from1989 to 1991.

Leilani Jennings received her Ph.D. in clinical psychology from the Fielding Institute, Santa Barbara, California. She received her master's degree in social psychology from the University of Houston. She was a parish DRE for more than 10 years and served as president of the NPCD from 1983 to 1986.

IN N

We live in a society that likes to do things quickly. We live and work on the "fast track." When it comes to forming associations, however, there is no fast track. One can not go down to the local discount chain and purchase an association, ready to be decorated with a name and a logo. Making an association of DREs involves complex decisions that lead to complex actions. Each decision and each step that is taken forms a solid building block on which is built the firm foundation that will make for a lasting association. This guidebook offers a process for forming associations that will last over the long term and for developing associations that will have a lasting effect. The guidebook will help you build an association "from scratch," resisting quick fix solutions. The suggested process has been derived from years of experience with associations in various stages of formation, growth and development. Along the way, the guidebook will illustrate what happens when individuals gather together as followers of Christ. The process of associating has a long and cherished tradition in the Roman Catholic church (See **Appendix One** for selected readings regarding church teachings on associations).

While the focus and language of this text concentrate primarily on the catechetical ministry in parishes and schools, the information and recommendations contained within are valid and applicable to associations in general. Although terms may change, the goal of organizing people around a common purpose remains the same.

Chapter

1

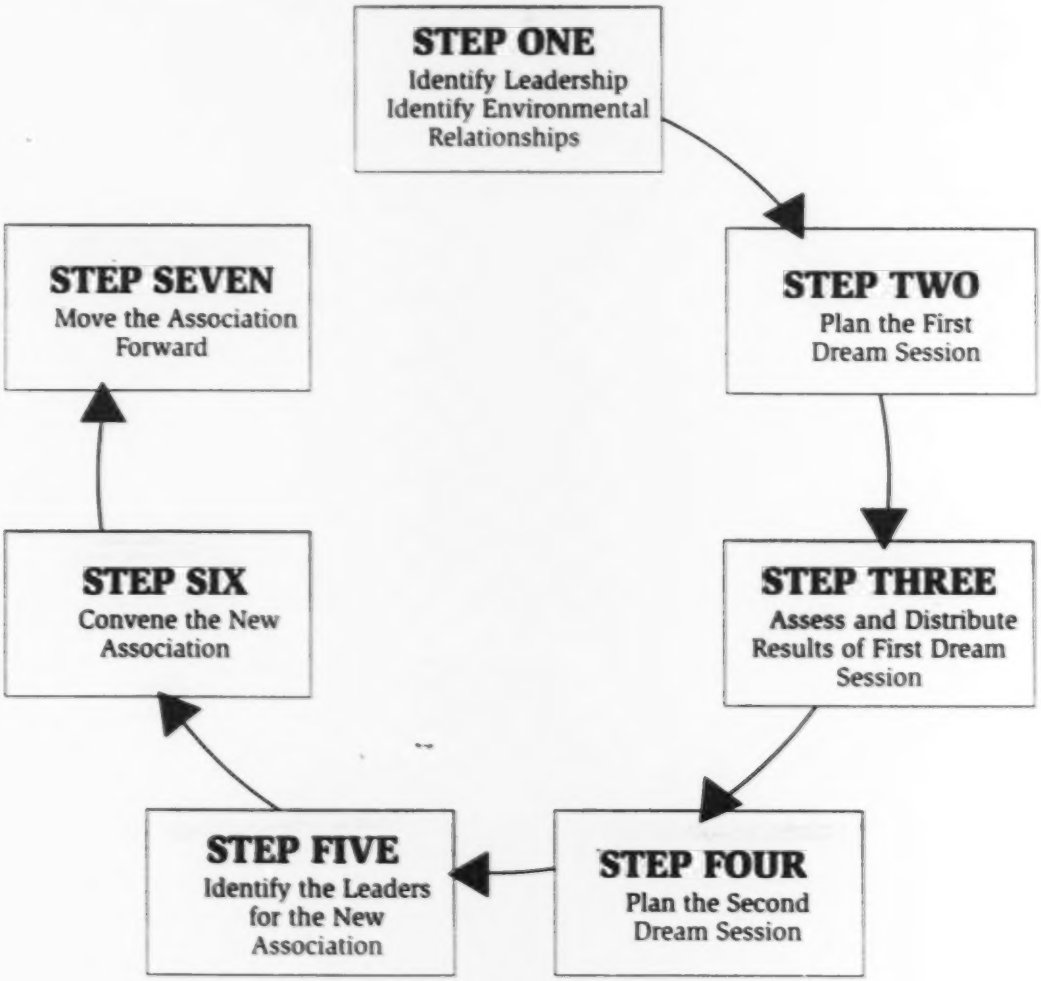
GATHERINGS AND OTHER BEGINNINGS

The process of forming an association can take between six months to a year, depending on local conditions of the DRE population, the diocese and the group who will be leading the formation process. Several gatherings of a leadership group and potential membership are described in the process. These gatherings are designed to insure that actual membership is involved in the formation process, a step that is considered crucial to membership commitment to the association over the long term. The leadership group is involved in several between-gathering tasks in addition to the gatherings in the recommended process.

A second preliminary recommendation is that the leadership group communicate with the leadership of at least two existing DRE associations, asking for information about how those groups were formed. **Appendix Two** offers sample stories of some of those other groups. These stories are provided to help the leadership group begin thinking creatively as they design the formation process.

What the Process Looks Like

Sometimes it is easier to visualize what the process might look like by breaking it down into its components. The following graphic represents the process that is outlined in more detail in each succeeding chapter.



Chapter

2

WHO WILL BE LEADERS

STEP ONE
Identify Leadership
Identify Environmental Relationships

Historically, associations form because small groups of DREs are meeting regularly on an informal basis. These groups can be very small (2-3 people) or they can be larger (10-15). Small groups offer an avenue for professional support and personal growth. When groups are successful at support, and members begin to grow, it is a natural inclination to make the group more formal. For example, some DREs in a deanery often meet for lunch to share concerns that arise during the deanery meeting agenda or just to share information about each other's programs. Informal groups like these form the nucleus from which a leadership group can begin a formal association. Once the leadership group has decided that an association is a good idea, they may want to check some things out, to make sure that the people who might be involved in the association actually NEED the association. It is important to have a leadership group with the right **skills**, and an **environment** that will support the growing process. It is also important to have the **support** of people with experience in associations. This chapter presents some reflections on these three components of successful association making. All three of the above areas are extremely important for the leadership group to consider thoroughly **prior** to making concrete plans about the association itself.

Purpose: This chapter will identify the skills that leaders need in order to form an association. It also describes how to determine if the environment will support an association. Finally, this chapter examines what other supports might be available to a new association.

Leadership Skills

In association making, a variety of different skills are needed for the leaders who will design the formation process. Three qualities that leaders can use in developing potential associations are:

a) authentic, honest and accurate **language**
b) **empathy**—the ability to understand another's position and life experiences
c) **willingness to accept responsibility**

DREs who have already "made" associations have indicated that there are a few other requirements for "getting through" the formation period:

- **Patience:** The process will be complicated; it will take longer than anticipated. Many meetings in which people have the opportunity to express themselves will be required. These meetings will require leaders and potential members to be patient while the process is being completed.
- **Perseverance:** Beyond patience, perseverance means pushing ahead, determination, an unwillingness to give up when the going gets tough.
- **Trust, belief and faith are also required.** Individuals must believe in what is being done. They must trust the process they design for forming the group. It is necessary to have faith that the gentle or perhaps not so gentle prodding that is beckoning the leadership group in this endeavor is the power of love, the spirit that creates and sustains new life.

The leadership group will also need help from outside. The diocesan staff can provide guidance, support and insight. Asking other DREs who have formed associations how they handled particular situations can provide excellent resources and insights.

The leadership group will need skills. Many DREs possess the skills that are necessary for the process of formation. DREs are facilitators of faith development, and facilitation skills are essential to association making. It is necessary to draw upon these skills in order to match people to necessary tasks in the association's birthing process. Identifying people with specific skills is a skill in and of itself. Another component of the process is to identify what necessary skills are missing in the leaders and seeking those through personal education or outside support. The leadership group will also need the skill of knowing when not to be too stubborn, too demanding, too patient. This is a critical skill that often cannot be "learned" but must come from honest, heart-to-heart discussions with others, and honest evaluations of the present situation.

It is essential to consider how the individuals who will be the membership of the group are to be treated. Though the individual must at times sacrifice his or her wishes for the good of the group, the individual must never get lost. Groups exist for the individuals who comprise them. The group depends upon the willingness of individuals to give and to gain, each to give to the all and all to one. So, the final, but most important thing needed, is concern for the common good.

Clarifying a Fundamental Relationship

DRE associations relate to diocesan offices in a variety of ways. They can be **dependent** on the diocesan office; be **interdependent** with the diocesan office; or they can be **independent** of the diocesan office. Each of these relationships is described below. The particular kind of relationship your association will have with the diocesan office is a decision that must be made early in the process of forming the association.

If it is a **dependent** relationship, the association will rely on the diocesan office for any or all of the following:

- **resources** (such as communication networks)

- **direction** (the purpose for which it exists)
- **goal formulation**
- **goal implementation**
- **leadership structure**

If the association is **interdependent**, it will rely on the diocesan office for some of the above and on itself for the remainder. If the association is **independent**, it may not rely on the diocesan office for any of the above. Independent associations are those that act to complement the work of diocesan or deanery networks, but they do not depend on diocesan structure or resources for conducting association business. Examples of these three types of associations can be found across the country (See **Appendix Two** for association stories). As diocesan offices suffer cutbacks in resources and staffing, independent associations can provide a valuable collaborative service to dioceses as well as to parishes.

It is recommended that the leadership group meet with the appropriate person(s) in the diocesan office for the purpose of clarifying this relationship prior to any other formal activity. Individual DREs migh have a variety of different assumptions about this mutual relationship. In order to avoid misunderstandings it is important to clarify the relationship early.

The leadership group should clarify whether diocesan staff will participate in the formation process of the association. Ideally, a representative of the diocesan office will be present during each of the initial gatherings of potential membership. Diocesan staff could also meet with the leadership group as necessary, responding in an advisory capacity to the various stages of information gathering that will be necessary as the association forms. Diocesan staff can be involved as little or as much as the leadership group and the staff itself decides will facilitate the joint and separate missions of each entity.

Evaluating Environmental Support

The diocesan office is a valuable environmental support for new associations. There are other environmental factors that may facilitate or hinder the work of the new association. The leadership group may consider the following factors in determining whether the environment can support a new association.

Facilitating Factors

Several of the following factors must exist for a new association to be viable.

1. There is no existing adequate communication structure for the whole body of DREs but there is a desire for such a structure. If no desire is articulated, the leadership group can begin to discuss the possibility with other DREs in an informal manner.
2. There are no existing diocesan guidelines for DREs regarding job descriptions, contracts, salaries, etc.
3. The diocesan office is overburdened or cut back so that the professional growth of DREs is not a prime factor. Associations usually have as a primary mission the professional growth of membership.
4. Few or no opportunities exist in an area for DREs' professional growth or spiritual renewal.
5. There is a high attrition rate among DREs (adequately measured and verifiable). Burnout can be attributable to lack of professional and/or personal support systems.
6. There is dissatisfaction with religious education programming.
7. New DREs need the support of experienced DREs, with no structured way of obtaining this support.
8. A broad range of networking needs exists across diocesan lines. This is especially

true if there is a provincial or national DRE association but no local group that can be identified.

The leadership group should consider how the above factors may affect the formation of the new association. In **Appendix Two,** the leadership group can read some examples of how existing associations formed, how they implement their mission, and their structures. Often these groups have evolved when financial cutbacks in diocesan offices have left a gap in needed services that support and sustain DREs. At other times, these groups formed through the efforts of diocesan and/or parish personnel who wanted to help support DREs.

Factors that Hinder

The presence of one or more of the following factors may not hinder the formation of an association, provided there are enough people with the necessary needs and skills to compensate for their presence. The important thing for the leadership group to consider if these factors are present is that dialogue with the groups mentioned can transform the hindrances to facilitating factors.

1. Other bodies in the diocese or state that have created associations that are not successful.
2. A previous association which no longer exists.
3. Other associations in the diocese or state that are perceived as a "waste" of resources (time, money, people).
4. Strong lack of agreement on who the potential membership might be. This could include whether the association is for all persons who are directing religious education programs or only for DREs with Master's degrees, or any variation of this.
5. Opposition from external bodies (such as the diocesan office).
6. A diocesan association that exists in "name only."
7. Other groups in the diocese that are perceived as already meeting the needs of DREs, such as a DRE Advisory Board.
8. Real or perceived difficulty of DREs meeting together on a regular basis in order to accomplish something.

Numbers 5 and 7 above are the most difficult to overcome. Preliminary dialogue between the leadership group and these groups is essential.

Support of Other Experienced People

The leadership group should contact other people who may already be participating in local groups. Some of these may include youth ministers, liturgists or social ministers. Existing associations for these other ministers may provide information for DREs to use in the association formation process. Potential membership for the new association may be drawn from these other existing groups. Conversely, it may be possible to join existing groups rather than form a separate group. These are questions that can be discussed with other parish ministers.

Action Steps

At this point in the process of association making, the leadership group should accomplish the following:

1. Assess the leadership group.
   - What qualities and skills will the leadership group need?
   - How will deficits be addressed?
2. Clarify the relationship with the diocesan office: Three options have been suggested.
   - How do these suggestions fit with the leadership group's experience?
   - Are there significant differences among members of the leadership group or between the leadership group and the diocesan office?
   - What negotiating needs to be done?
3. Analyze the supporting environment.
   - Determine whether there are enough facilitating factors to balance the proportion of hindering factors.
   - If more positive factors need to be created, how will the leadership group create them?

Chapter

3

PLANNING THE FIRST DREAM SESSION

For parish DREs in the United States there is no task more important and no challenge more formidable than providing excellent religious education to children, young people and adults. Imagine parish DREs being empowered enough to guarantee this vision of excellence in catechesis. Imagine diocesan DREs empowered enough to collaborate with other parish and diocesan ministers for the benefit of all concerned. Imagine a nation or world where DREs are empowered enough to affect the life of the universal church in its mission of living the Gospel in the world. Steps **Two, Three** and **Four** describe a "dreaming" process for developing associations that are effective.

STEP TWO
Plan the First Dream Session

Purpose: To describe the planning procedures for the leadership group who will be organizing and conducting the dream sessions.

Dreams are an integral part of living. Before anything new can happen, there first must be a dream - a vision. Dreams may range from the very mundane to the truly "other-worldly." It was because of a dream that the captives of Babylon were able to return to their desolate, destroyed homeland to begin rebuilding and re-creating their lives. It was because of a dream that a country like ours came into existence. It was because of a dream that African-Americans of our country challenged the narrowness of a previous dream. Dreams, then, are hopes. The future begins with a dream.

When DREs begin talking about gathering together, they are imagining a future that is built on today's dream. As Tracy (1981) notes, when people talk to one another about dreams, it is very probable that they will be changed as people and that fact can change the future.

Dreams (or a vision) are essential because they provide the push and pull. They tell what a **changed** future might be like. Dreams also define the character of the association. Articulating the dreams for the association is an important task. A "dream session" can provide a sense of a future that is exciting, while sustaining the association in difficult times.

Participants

There are two groups of participants that will take part in the first dream session: the leadership group and a sample from the potential membership. This chapter assumes that the leadership group has already evaluated the environment and support needs discussed in the previous chapter. By now, the leadership group has identified people with the skills needed to conduct the remainder of the process. The next task is to identify who will participate in the first dream session. The precise number needed is not as important as is the size of the pool of potential members for the new association. DREs who work in rural parishes, for example, may be able to form a new association with smaller numbers than would be the case for a large urban area. In deciding whom to invite, it is helpful to know how many DREs are in the potential membership group. Invitations can be issued to all DREs in the diocese, for example. Successful dream sessions have been held with as few as 15 participants, and as many as 150. The leadership group should decide on the potential pool of members, invite people to participate, determine by RSVP what size the dream session might be, and then plan the session according to the numbers expected.

The purpose of the first dream session is to answer the question: "What kind of association is wanted?" The goals of the session will include listening to the assumptions and expectations of participants; and sharing information gathered by the leadership group as it begins the formation process. Both the **process** and the **content** of the dream session determine the goals. The leadership group is charged with ongoing evaluation of the goals of the dream session, its process and its content.

Process for the Dream Session

In the dream session, all participants have equal opportunity to be heard by the leadership group. During the dream session, there should be an opportunity for participants to have some input to the process of the gathering. Early consultation with potential membership ensures that each individual DRE makes a decision about future participation based on some degree of ownership to the process of group formation. Participants also assent to the goals of the dream session and the process that will be used. Techniques like brainstorming and problem solving can be used. The following exercise is a sample of an activity that can be used during the dream session.

Guided Imagery: Surfacing Expectations

Begin with a relaxation exercise. Then say:

Imagine you are a DRE in St. X parish in the diocese of Kittly Klute. You have been in this parish for two years. You know some of the other DREs in the diocese, but only superficially. You haven't had a chance to spend any time with them. DREs in this diocese are extremely busy with their many parish responsibilities. When DREs need assistance they individually call the diocesan office. The diocesan office wants to help the DREs, but there are only two people in the office and they are already extremely busy.

The diocesan office sends out a newsletter to DREs every three months. The last newsletter is on the top of your reading stack. You notice an announcement of a gathering for DREs. This gathering is for the purpose of sharing parish experiences. As you read the announcement, what is your reaction? (Pause)

You look at your calendar and discover that the day of this gathering is also a day that you have scheduled an informal meeting with two of your volunteers. The meeting with the volunteers is important, so you set the information about the DRE gathering aside. Next, from your reading stack you pick up the agenda for the next parish pastoral council meeeting. You look it over and notice that religious education is the main topic on the agenda. You realize that no one has told you about this

discussion and that you have not been asked to be at the meeting. What is your reaction? (Pause)

You begin to wonder if other DREs ever have situations like this. You remember the notice about the DRE gathering. It says this will be an opportunity for DREs to join together to address their issues and concerns. But, you have scheduled this volunteer meeting. What are you going to do? (Pause)

You decide that it is important for you to attend the DRE gathering and re-schedule the meeting with the volunteers. You begin to think about what you expect from this DRE gathering. This opportunity to be with other DREs will help you and the parish in a number of different ways. Write down all the ideas that come to your mind.

To analyze the expectations and assumptions surfaced by the exercise, the group may be divided into small groups at tables. A facilitator leads the group in a discussion of each of the statements that DREs wrote during the pauses. These ideas can be done verbally or they can be written down. For example, the facilitator states the first reaction again. Each DRE is given a slip of paper on which to write a reaction. That slip is put in the center of the table and another slip is taken. The process continues until everyone's reaction has been written down. These papers are then collected at the end of 30-45 minutes (or whenever the process slows down), and analyzed by the leadership group later.

Content of the Dream Session

The content of the dream session involves the participants' **assumptions, dreams,** and **purpose** for forming an association. Goals for the association can also be considered, though these will more properly form the content of the second participant gathering. During this first session, some individuals may need to ask about issues or goals before they can commit to any further formation. This need can be respected by allowing a brief preliminary discussion, making sure that participants realize that the topic will be addressed formally at the next gathering. The content of this session also includes a presentation by the leadership group of all information gathered up to this point. This presentation includes an analysis of environmental conditions, the role of the diocesan office, and the tentative plan for forming the association (including a flexible timeline). The material for this portion of the presentation is taken from the needs assessment done by the leadership group.

At the close of the dream session, the leadership group may also want to recruit some additional volunteers to assist with the formation process. The dream session closes with participant evaluation of the gathering. This evaluation provides the leadership group with an objective impression of the process.

Dream Session Results

STEP THREE
Assess and Distribute Results of First Dream Session

At this point, the leadership group has generated data from potential membership in the form of the visioning exercise and/or brainstorming techniques. The written participant evaluations collected at the end of the meeting also are analyzed. The leadership group should not expect 100% enthusiasm for association formation. A relatively small percentage (under 20%) of skepticism should be expected. If the percentage is larger, the leadership group may need to adjust the formation plan. One adjustment may be to begin with a smaller association. This small group can be evaluated over a period of time, and if it proves itself to be valuable, then it can be enlarged in scope.

The leadership group then assembles the data provided by the participants and organizes it into major content areas. Within each content area, the data should be organized accord-

ing to similarities. The goal of this analysis is to organize the information in such a way that it will be manageable. Efforts should be made to retain as much of the original wording of the participants as possible. Participants will want to identify their work after the leadership group has finished.

Once the initial information is assembled, it is distributed to potential members. A procedure for individual response to the information should be included in this distribution. Participants are asked to provide the leadership group with three responses to the information distributed:

- identify any missing pieces of information;
- prioritize their preferences among the results;
- provide any questions with regard to the procedure and the content that has been followed to date.

The leadership group then identifies a process for prioritizing the results of participant response. This can be done by assigning a limited number of "votes" per participant, rank ordering all responses by category, etc. Participants should be given a reasonable time line to respond, and a deadline for returning their work to the leadership group.

Once the deadline has passed, the leadership group again organizes the information as preparation for the second gathering. The planning for this second gathering (Step Four) is similar to the planning for the first dream session.

STEP FOUR
Plan the Second Dream Session

Action Steps

1. Plan the first dream session.
2. Invite potential members to join the leadership group in the first dream session.
3. Conduct the dream session.
4. Evaluate the results.
5. Distribute the results to all participants.
6. Repeat above steps for second dream session.

Chapter

4

LEADERSHIP FOR THE NEW ASSOCIATION

STEP FIVE
Identify the Leaders for the New Association

Associations function well only if the leadership body is able to function well (McKinley, 1967). The leadership body models healthy styles of interacting for the rest of the association. The leadership body also facilitates the business of the association. This chapter builds on material presented in previous chapters about the association as a whole. Information that has been offered about assumptions and expectations of potential members, surfaced during the dream sessions, can be applied to the leadership body.

Purpose: This chapter describes the steps involved in forming a leadership body; offers some principles for effective communication; describes the role of the leader in the leadership body; suggests some provisions for development of leadership; and offers some reflections for persons considering leadership positions.

Leaders for the New Association

The first step in the formation of the leadership body is to clarify expectations. The leadership group should spend some time discussing criteria for selection of the leadership team. Some points to consider include:

1. The "oughts" and "shoulds" that individuals use to evaluate themselves and others should be made explicit. Often these judgement criteria remain implicit, not fully available to the persons involved or to others. This does not mean that these implicit personal standards are invalid. It means that when these criteria remain implicit and solely personal, misunderstanding and frustration can result.

For example, the majority of women have been socialized against being assertive in groups. Some women may be assertive in groups comprised only of women, but change their behavior patterns in groups comprised of both men and women. Many women are

not aware of these behavior patterns. Others do not question the validity of the rules behind their behavior. Some men communicate in a problem-solving manner. They do not question their underlying expectations before moving to the task at hand. Behavior of both women and men, however, is influenced by expectations that people bring to a task. When the task is the complex one of association formation, it is critical that assumptions be articulated and examined. (For a resource on gender-based differences in communication style, cf Tannen, 1990).

2. Individuals need to be aware of the costs of participation in the leadership body. Participation in groups is never free. The benefits provided by groups are balanced by the need for personal accommodation and compromise. Any relationship requires giving up some personal independence. When compromises begin, it is important for leaders to remember that if the common good is to be served, individual differences must be integrated.

Conceptualizing a Structure

The next phase of step five is to decide on a structure for the leadership body. Structure is a function of the TASKS of the association and of the NEEDS of the members. The structure of the leadership body includes leadership roles and leadership functions, as well as how these roles and functions relate to one another.

In deciding on a structure for the leadership body, it is important to consider the sources and distribution of power for the leadership group. Association leadership can accomplish group activities insofar as others perceive that leaders are capable people. The more effective the person, the more likely the association will be seen as attractive, influential and accepted. Typically in groups, there are several kinds of power. An individual may bring the following sources of power to a leadership body:

- **Functional power:** The person who enables or inhibits group activity through sharing or concealing information.
- **Idea power:** The person who has new suggestions or ideas; ways to solve problems or to get things done.
- **Position power:** The person who is effective in a particular role, e.g. a good coordinator.
- **Personal power:** The person to whom people pay attention because of some personal characteristics.

The leadership group needs to be a diverse group of individuals, so that the each type of power is available to the association.

Leader competencies

Cooperation and **Competition** are two competencies associated with leadership positions (Whitehead & Whitehead, 1982). Both of these dynamics are related to power.

Cooperation is essential to the well-being of any association. It is critical for the association to be able to accomplish its goals. In order to promote cooperation, each candidate for leadership needs to consider the following cooperation competencies:

1. Individuals must be aware of the **particular** contribution that they can make to the common goal.
2. Individuals must be aware of their personal strengths and limitations.
3. Individuals must be secure enough with their strengths that they can be offered to the group task, even though the offer may not be accepted.
4. Individuals must be flexible enough to accept the possibility of their contributions being modified by other members.
5. Individuals must be empathic enough to be able to take pride in what the group has accomplished together.

Competition, unlike cooperation, is often viewed negatively. The negative effects of competition are obvious to most people. Competition within the association is rooted in the limitation of resources and in the different values and preferences of individual members. If there were enough money, time and people, the association might be able to do (or at least attempt) everything, and the need for competition might be eliminated. There will always be limitations of resources, however, so it is likely that competition will also always be a factor with which groups will have to contend.

There are positive aspects of competition. In order for the leadership body to be able to cope with competition, members must accept themselves as competitors. The following competition competencies are suggested:

1. Realistic awareness of an individual's personal strengths and weaknesses.
2. Accurate understanding of one's preferred style of relating to others.
3. Willingness to use one's abilities and relational style to serve the needs of the group effectively.

Competition helps individuals express their abilities, exposing them to the test of a concrete challenge to grow.

Leaders who can be both competitive and cooperative are able to respond flexibly to a variety of activities and situations (e.g., conflict resolution, negotiation, planning). These characteristics imply a healthy sense of personal power. When individuals have this healthy sense, all members of a leadership group can share in contributing functional, idea and personal power for the good of the whole group.

Appendix Three provides additional qualities that are desirable in persons who will be leaders.

In summary, both structure and power are intimately related to each other. When attention is given to both, the leadership body is likely to be able to act as a team. The terms used to denote this relationship are many. Some leadership bodies are called executive committees; others are called coordinating teams. The words "executive committee" imply a group of people set apart from membership and making decisions for the association. These words imply less of a role for membership in planning and decision making. A term such as "coordinating team", on the other hand, implies a group of people who are relatively equal in their share of power and whose primary responsibility is coordination of decisions and plans of a membership body.

Size of Leadership Body

Another important facet of identifying the potential leadership group is to consider its size. Potential leaders can come from the initial leadership group, from diocesan wide representatives, or from elections. In considering size, four suggestions are offered to the leadership group:

1. The larger the leadership body, the less influence (power) individuals have. Possible power is spread among more members.
2. Groups become more complex the larger they become. This complexity is a function of the number of individuals who will be communicating with each other.
3. The larger the group, the more inefficient it is. In some groups, this inefficiency is controlled by becoming impersonal in transacting association affairs.
4. The larger the group, the more likely informal sub-groupings of members will develop, adding a dimension of us and them to the dynamics of the group.

Communication Within the Leadership Body

Leadership bodies share in planning and decision making for the association. It is assumed that the most effective leadership bodies are those which function in an atmosphere of trust and effective communication. The consensus decision making process is recommended as one of the most effective ways of involving people as effective leaders while promoting trust formation. In consensus decision making, all members are responsible for sharing their thoughts, ideas and feelings within the context of the task at hand. As members interact with each other through consensus, a shared experience develops which contributes to trust formation. Members generate interpersonal trust as a result of sharing experiences of being accepted as worthy persons. Two rules of thumb that can help members build trust include:

1. Each member is responsible for communicating their own thoughts and feelings.
2. The more each member participates (e.g. takes risks) the more trust will build.

It should also be noted that members who are affirmed in their risk taking will be likely to risk more.

Tasks of the New Leaders

In order to be effective association leaders, the leadership group must consider several tasks. One is to assist the association in adapting to changing environments. For example, suppose a DRE wanted to investigate a new model for religious education, the association could assist the DRE (or several members) by doing a survey of current models that members use effectively. A different approach to the same need might be for the association to research existing data banks for models of religious education across the country.

Another task is to reduce complex and ambiguous information to a more manageable level. Diocesan guidelines often come from various offices, e.g. youth ministry might have guidelines for confirmation of adolescents while the office of religious education might have separate sets of guidelines. The association could be a clearinghouse for analyzing guidelines and disseminating information to membership. Sometimes the task of association leaders is simply to facilitate understanding and agreement among membership by providing a forum where such expression can take place. An example of this task would be the provision of shared interest groups during a workshop or convention. These tasks (environmental adaptation, data management and discussion forums) lead to complex communication patterns for leadership to consider.

Complex tasks require both **task** and **relational** responses. Conflict is a natural function of a group. During conflict phases, there may be a high degree of dissension among members. In these situations, leadership can attempt to bring agreement on essential and desirable solutions to a problem. In other situations, the agreement may simply be one of planning how to address the conflict rather than attempting to solve the conflict itself. Sometimes the leadership group will simply bring the group to acknowledge that there is a conflict. The more complex the task or situation, the more likely it will be that leadership will have to acknowledge the interpersonal level of the conflict as well as the task level.

Sometimes a group may be characterized by defensiveness rather than support. In this case, leadership will have to acknowledge the existing climate and arrange for more complex conflict management skills to be acquired. Leaders may need to enlist outside facilitators to manage this type of conflict. Another task of leadership might be to provide specific and objective information as part of managing the conflict.

Generally speaking, groups with ambiguously defined roles require more leadership management than do groups with well-defined roles. Ambiguity can produce more conflict where members and/or leadership are not clear about what their purpose is. Individuals must know who they are in the association or leadership body and what the expectations of a particular role are. Job descriptions for leaders are particularly helpful in this regard.

Both leadership effectiveness and membership satisfaction are directly related to the degree of attention that is given to both the task and relational goals of an association.

The Person of the Leader

Successful leadership is "not only moving an (association) toward its goals but also maximizing its functioning." (Friedman, 1985). The model proposed for successful leadership of an association is an organic model. The organic leader is concerned primarily with her or his ability to take a position rather than to motivate others. When leaders attend to their own functioning, rather than the functioning of others, they are able to become more effective change agents. Organic leaders do not attempt to control others, but focus instead on *being with* the other members. The organic leader also remembers to include the emotional (relational) domain along with task and content. Friedman points out three components of organic leadership:

1. The leader defines himself/herself and invites others to define their position as well. This is done proactively rather than reactively.
2. The leader remains self-defined, and in touch with others despite any conflicts. This is the most difficult part of the model, and requires an invitation to clarify sources of conflict based on various positions.
3. Groups by nature try to maintain stability. The organic leader must be aware that members who are unable to define positions may invest their energy in attempting to prevent changes simply because change is difficult.

The model of leadership described above results in a less burdensome role for the leader than most leadership roles. Change happens more efficiently when each person concentrates on changing that which is in their control to change, namely their own position. The theological consequences of self-defined leadership are important to note. Leaders in this model do not create clones. Instead, they allow each member to grow uniquely. The organic leadership model is the highest responsibility of servant leadership. As has been true for the other components of the association making model presented here, what has been said about the person of the leader can also be applied to the entire leadership body as it defines itself in relationship to the membership.

Leadership Development

Effective members of a leadership body are responsible for many tasks. The primary goal of leadership development is to provide appropriate training for members to become effective at shared planning and shared decision making. Leadership development activities enhance effectiveness through developing a sense of autonomy for the group. Often it is assumed that the principal focus of leadership development should be on skill building. Lack of skills in task or relational functioning may be a necessary function of leadership development, but without the support of helping members to define their underlying values, skill-building will have little real effect.

Personality inventories can be used to increase awareness of members' values (e.g. Myers-Briggs Type Indicator, Myers & McCaulley, 1985). These inventories can also help members become aware of the strengths of each of the other members. Inventories provide objective information on individual differences that members can use to understand each other and to facilitate communication. This knowledge increases the group's ability to balance itself, capitalizing on strengths and compensating for weaknesses.

Leadership development sessions which include self-assessment, self-disclosure, feedback, risk-taking, and consensual validation enable members to increase these abilities. The primary prerequisite for leadership development sessions that promote this type of

assessment is a climate of trust. In this type of climate, members **describe** instead of **evaluate**. The focus is on the solution to a problem/issue, not on control of it. There is spontaneity wherein members feel free to express themselves instead of feeling repressed. There is an expression of empathy for others, rather than neutrality. There is a sense of equality rather than superiority. And finally, instead of certainty, there is provisionalism, knowing that very few things can be decided once and for all time.

Leadership Development Process

Evaluate - - - - - - - - - - - - - > Describe

Control - - - - - - - - - - - - - > Solution

Repression - - - - - - - - - - - > Expression

Neutrality - - - - - - - - - - - - > Empathy

Superiority - - - - - - - - - - - > Equality

Certainty - - - - - - - - - > Provisionalism

Group sessions which allow members to develop these qualities will generate a climate of trust that will ensure effective leadership.

Leadership development activities should be an ongoing activity for the leadership body. The leadership body may include development activities as part of every meeting, or they may have quarterly all-day sessions, or a combination of these two approaches or similar ones. The leadership body should identify goals for itself which include a specific process for its ongoing development. Development activities are those which allow members to:

1. Develop the qualities necessary for a supportive, trust-building climate.
2. Explore the values members hold about task and relational functions.
3. Provide opportunities for self-assessment, for sharing with other members, for receiving appropriate feedback, for taking appropriate risks, and for being validated.
4. Work on specific task and relational skills.

Integrating New Members

One final aspect of leadership body development involves how new members become integrated within an already functioning leadership body. New members are needed either because of completion of terms or because of resignations. Whenever new members join the group, the group changes. Usually new members join as others are leaving, so the remainder of the existing group has to deal with *both* of these changes. The leadership body needs to identify ways to cope with loss of members who leave. Additionally, they need a process that will enable new members to become a functioning part of the group as quickly as possible.

It takes time to learn the idiosyncrasies of the way groups do things. It may take six months or more for new persons to define ingrained issues and values of a group. Typically, the older the association is, the more ingrained the issues will be. A sign of ingrained issues is the infamous "We've always done it this way" statement heard in some groups. In the following text, a process for integrating new members is described. Associations may wish to use it as it is, adapt it, or develop a new one.

Suggested Process for Integrating New Members

Several steps are required. An outside facilitator is recommended. If a member acts as the facilitator, the group needs to allow for that person assuming this dual role. This particular process typically takes four hours. It should take place in a comfortable and safe

setting. Well before the session takes place, the design is defined, edited and accepted by all members (new and current) so there are no surprises for anyone.

STEP 1: Icebreaker—which includes a sharing of names, position, personal background, family, interests/hobbies. This is both an information-gathering tool and a builder of social bonds. This should be more than just having people introduce themselves or having them fill out an information form.

STEP 2: Individually, current members generate a list of questions (specifically: personal and professional questions) for the new members which they may or may not answer, by their choice, later in the session (e.g. What gift do you bring to the group? What goal do you have for the group? etc.)

STEP 3: New members leave the room with questions from Step 2. They should be given instructions on what is expected of them. There should be comfortable space for them to use. New members answer the questions described in step 2. One hour is enough time for this step. By having written questions and their responses ready for Step 5, new members can be more secure in their interaction with current members.

STEP 4: After the new members leave, each current member answers the following questions: What do you already know about the new members? What would you like to know? What should they know about you? What concerns do you have about their being in the leadership body? Are there any 'hot items' for the leadership body to consider? What are four critical objectives for this leadership body? What are three key values for which the leadership body should be known? The answers to these questions are recorded on a flip chart as explicitly as possible. Current members take a few minutes to rehearse their mini-presentations for the new members.

STEP 5: New members return to be debriefed about their responses to the above questions. Current members then take turns reviewing their responses. New members can comment or ask questions about items. This gives new members an opportunity to interact with current members in an informal though structured format.

STEP 6: New members refer to their individual questions where appropriate during this procedure.

STEP 7: Critical issues and critical items are identified and reviewed by all members for future steps and action planning.

STEP 8: Members write a vision of what they see this leadership body and themselves doing in six months. This step gives each member a chance to make a personal commitment to the leadership body. These visions are collected by the leader.

STEP 9: Members critique the session.

STEP 10: Facilitator summarizes the session.

Reflections for Prospective Leaders

There are a number of reflection questions that prospective leadership body members can consider in deciding on whether to participate in a leadership group.

Personal Questions

1. Can I personally accept and promote this form of leadership?
2. Will my participation in this group satisfy my personal needs for recognition and accomplishment?
3. Am I willing to share responsibility with others, without needing to control?
4. Am I willing to accept the possible frustrations of shared decision-making and shared leadership?
5. What is my preference for ordering time: Do I lead with past, present or future? What follows my prime preference?

Questions about Other Members

1. Do I share a common value system and common goals with others on the leadership body?
2. Do I understand and respect their need for personal satisfaction and sense of accomplishment?
3. Will I be able to work with them individually?
4. Do I have difficulties with any of the members which would possibly have a negative effect on the working of the team?

Questions about the Leadership Body and the Association

1. Do the leadership body and the association members have common goals that are accepted by both groups?
2. Are the roles within the leadership body clearly defined?
3. Will the leadership group work together on projects or will this group involve other association members in projects and work primarily with membership?
4. Does the leadership body adhere to its stated commitment to shared planning and shared decision-making?

Action Steps

At this point, a number of issues have been identified for the leadership group to consider in forming the leadership body of the association. Before going on, the following is recommended:

1. Identify how selection of leadership body members will take place. Selection should include a way of identifying the values and beliefs of individuals to be invited to serve. It should also include a way to analyze the cost of participation for leadership body members.
2. Consider specific leadership roles, functions and their relationships with each other.
3. Consider how authority will be distributed among leadership body members. Will the leadership body be collaborative, cooperative, etc.? What effect will the chosen power arrangement have on the way members relate to the association as a whole?
4. Consider what the size of the leadership body should be. This takes into account the factors identified in this chapter.
5. Begin to incorporate shared planning and shared decision-making into the present leadership group interactions.
6. Design a plan for enabling leadership body members to acquire necessary communication skills.
7. Define the role of the **leader** of the leadership body. This includes a plan for enabling this person to acquire the ability to provide the appropriate leadership skills to the leadership body.
8. Identify leadership development goals and describe a plan for implementing the goals within the leadership body.
9. Provide prospective leaders, now and in the future, with a "preparation packet" which includes the operative norms of the leadership body and reflection questions such as those provided in this chapter.
10. Celebrate the new leadership body with an appropriate ritual.

Appendix Four provides an example of a commitment ceremony for leaders.

Chapter

5

An Association is Born

STEP SIX
Convene the New Association

At this stage, the association is formed and its purpose is ready to be implemented. The association leader and the leadership group have been identified. If the preceding five steps have been thoroughly conducted, the new association will have a healthy foundation. Step Six addresses the end of the formation process, and the beginning of association life. The information presented in this chapter is useful for new associations. It can also be used by existing associations to assess association health.

Purpose: This chapter addresses some typical experiences of associations at the transition stage from formation to establishment, including some issues that often get over-looked, and factors that affect the ability of the association to make a difference.

Roles and Responsibilities of Associations

During the early life of an association, members may be shocked by the number and variation of role responsibilities and expectations that they encounter. For example, the decision to have a treasurer brings with it the need to decide on a bank, the type of account, the location, who will sign off on the account, how the transfer of signatures will occur at the end of a term, etc. Unexpected consequences of earlier decisions may appear. The details of being a group seem to proliferate. Some members will want to attend to the task of the association; others will want to attend to ideals and goals. Still others might want to focus on developing the group relationally. In the early phases of group development, discussions will tend to be general and nonthreatening, unless there is a specific effort made to bring the group to a different level. Member interaction will tend to be polite initially. Again, the task and relationship dimensions of being an association will need attention. Soon the "honeymoon" period begins to fade and the glow of new beginnings

wears off. Now is the time for association leaders to remind themselves and membership that all groups go through difficult phases of development. Conflict can be energizing as well as stressful. Change is accompanied by some chaos.

When the honeymoon period is over, consensus decision making begins to be time consuming. Members may lose patience because they are anxious to get something done (usually there is so much that must be done). Decision making begins to be time consuming. Members increase their haggling over the specifics of goals and tasks as they attempt to accommodate diverse needs and preferences. Visible signs of frustration or hostility may become more apparent. Again, predicting these differences in group activities can help members to work together. It is during this phase of group life that the skills discussed in the section on leadership become extremely useful.

The usual result of this phase of development is that members grow more cohesive. This stage, then, is a necesssary one even though it arises out of frustration. It is a sign of members' coming together and struggling to work with one another. Now, the real work of the leadership body begins. The suggestions in the leadership development section above should be referenced as needed. Once the leadership body has learned how to work with its members, members pass from a feeling of dependency and helplessness to a state of realized group autonomy.

With the new sense of self-confidence and trust, the association may arrive at a point where it feels free to seek help from outside as well as from within itself. When there are internal conflicts, members will feel secure enough in their ability to articulate positions that they can work well with outside consultants. Now members recognize they are autonomous as a group and thus are responsible for using their freedom to serve the common good.

All developing associations tend to experience these events in one form or another. The manner in which the events are expressed, however, will differ from group to group. Groups tend to experience the typical events of one period before they experience those of the next.

Moving Forward

STEP SEVEN
Move the Association Forward

To keep the association progressing successfully, several activities can be undertaken by association leadership. These activities should be incorporated into the initial formation process, and should continue to be a part of what the association does regularly. In other words, these activities become "routine" for the new association.

- **Sharing Stories**
  An opportunity for individuals to share who they are as DREs is important for developing a sense of belonging. This contributes to social bonding of the group and as a result, to group cohesiveness. As the association forms and continues to exist, its story should be told, perhaps at yearly elections or social events. For example, a founding president of an association can be invited to tell a new leadership group how the association was formed.
- **Affirmation**
  Associations exist in order to make a difference in the lives and ministry of members. Association members need to affirm that the association has value and worth. Recognizing and affirming individuals who have contributed to the association's purpose is also essential so that members will know that what they have done has value. This also helps the association to know what activities it values as a whole.
- **Celebration**
  One of the purposes of gathering together is to celebrate. Associations can celebrate the reality of their accomplishments. They can also take pleasure from being united in a common vision. Like the rhythms associated with the liturgical year, time needs to be set aside for celebrating the gifts and accomplishments of the association.

Making a Difference

It is assumed that associations exist because there is a need to make a difference. If change is to happen, however, the association must be able to mobilize and focus its resources effectively. To effect changes, the association must identify what resources are needed and how they will be used. Often overlooked in this process is the resource of membership that is unified and participates actively to support association efforts. The ability of the association to instill enthusiastic support for the effort is essential. Membership should be motivated to participate actively in support of the association.

The association must be able to recruit and maintain members. It must be recognized by its own constituency as an important and valuable entity that can act on its own behalf. Constant recruiting efforts are necessary to maintain the type of committed membership that can make a difference.

Outside Support

Associations that want to make a difference must sometimes rely on technical support beyond their own resources. This can take the form of calling in financial advisors, canon law experts or others who have expertise on the issue that the association is attempting to modify. If the association decides to conduct a conference, for example, it may need to acquire insurance to protect conference participants. See **Appendix Five** for information regarding the "business" ramifications of association efforts.

Regional and national associations can provide another kind of support. The National Association of Parish Coordinators/Directors of Religious Education (NPCD) is a large network of DREs which draws membership from across the country. When an association is grappling with a major issue, national associations can provide technical support to the local association. The larger the network, the more likely that affected groups will be reached and change can happen.

See Appendix Six for evaluating the need for interorganizational relationships.

Unity among groups is especially important. In the most successful situations, groups that combine their efforts have overlapping leadership. This ensures unity. Liaison relationships should be cultivated and formalized where the interests of various associations interact. An example of a liaison relationship is an independent association who has as an ex officio member someone who works in the diocesan office of religious education. Another type of liaison might be between lay ministry associations, such as the leader of a DRE association who is ex officio to a social ministry association.

Associations foster good communication by effective use of broadcast and print media. As in all situations, newsworthy efforts, such as well-attended gatherings and rallies, receive the most and the best attention. Coverage of association efforts by diocesan newspapers, appropriate attention to other diocesan communication channels, radio or TV programs and the secular press are all examples of avenues for promoting the association's efforts.

Action Steps

At this point the association is formed and business has begun. The following are some considerations for helping the association continue healthy development:

1. The exit from the honeymoon stage is viewed as a positive experience. It provides the impetus for the leadership body to learn to function well together. Ongoing leadership development plans are put into place.
2. The leadership body makes provisions for sharing stories, affirming individuals and celebrating itself and its membership.
3. The leadership body evaluates its need to relate with other groups that can help the association to be an effective change agent.
4. The leadership body makes effective use of media resources.

C N

Congratulations! The new association is a reality. Challenges have been met. An existing association is on its way to productive development. For those diligent readers who have persisted in the actualization of a dream - that of making a new association - the work of gathering together to enhance the ministry of DREs is now a reality. For those who have used this guidebook to enhance an existing association, it is hoped that the business of gathering together has been facilitated. Ongoing professional development for membership is the key to maintenance of the successful work leaders have begun. The common good is served by attending to both individual and group needs as has been outlined in this guide. Today's association is another link in an ongoing chain of Catholics working together to promote the common good.

APPENDIX ONE

THE CHURCH AS EMPLOYER: SOCIAL TEACHINGS

Beginning with the Hebrew scriptures and continuing to modern times, the Church has always championed the rights and responsibilities of employees. That long historical commitment is exemplified in the following selected teachings relevant to associations for Catholic workers.

Catechism of the Catholic Church #1879

Through the exchange with others, mutual service and dialogue with his brethren, man develops his potential; he thus responds to his vocation.

Catechism of the Catholic Church #1882

Certain societies, such as the family and the state, correspond more directly to the nature of man; they are necessary to him. To promote the participation of the greatest number in the life of a society, the creation of voluntary associations and institutions must be encouraged "on both national and international levels, which relate to economic and social goals, to cultural and recreational activities, to sport, to **various professions** (emphasis added), and to political affairs." This "socialization" also expresses the natural tendency for human beings to associate with one another for the sake of attaining objectives that exceed individual capacities. It develops the qualities of the person, especially the sense of initiative and responsibility and helps guarantee his rights.

Catechism of the Catholic Church #1906

By common good is to be understood "the sum total of social conditions which allow people, either as groups or as individuals, to reach their fulfillment more fully and more easily."

Quadragesimo Anno (In *Companion to the Catechism*, p. 645)

From that time on, fuller means of livelihood have been more securely obtained; for not only did works of beneficence and charity begin to multiply at the urging of the Pontiff, but there have also been established everywhere new and continuously expanding organizations in which workers, draftsmen, farmers and employees of every kind, with the counsel of the Church and frequently under the leadership of her priests, give and receive mutual

help and support.

Just Wages and Benefits for Lay and Religious Church Employees

Significantly, Pope Leo (In **Rerum Novarum**) affirmed the right of workers to form associations to "secure, so far as possible, an increase in the goods of body, of soul and of prosperity." p. 8

Pacem in Terris, #11-38

This document presents a number of rights and the responsibilities that flow from them, because of the nature of human dignity. One of these rights is the right to assembly and association.

Code of Canon Law, #215

Christ's faithful may freely establish and direct associations which serve charitable or pious purposes or which foster the Christian vocation in the world, and they may hold meetings to pursue these purposes by common effort.

APRENDIX TWO

A[illegible]N STORIES

(The following appeared in the NPCD Newsletter in December, 1983.)

I was invited to join a sharing and support group of DREs... [but] I considered the DRE group's programs something I could benefit from if I could master the art of bilocation... besides I thought that perhaps the "support" was a feigned thing anyway.

As the year progressed... my views changed drastically. My 60-hour work-week was never enough to complete my duties; yet, increasing demands were being made upon me... I had administrative, methodological, and counseling questions. My contract was too general and open to manipulation; and the salary I received... kept me worried about groceries from week to week.

I discovered that the DRE association was a group of people with the same dreams and goals as I, as well as many of the same struggles! ... A stress program showed me how to relax more during a stressful situation or workday. A Scripture study inspired and helped me to return to my spiritual life and reason for being amid all the confusion at work. A contract/pay recommendation for religious educators modified some attitudes and the pay scale at our parish.

What I had assessed to be a luxury turned out to be a necessity to prevent burnout. What I had imagined to be another "job" I didn't have time for was the source of my recharged inspiration, enthusiasm, and increased ability to promote the joy of Christ present in His Church - through religious education.

I invite you to become a member of the DRE association in your area or to help get one started. The formation of an association which provides vital spiritual, educational, and moral support and enthusiasm is integrally linked to your participation.

Can an association be invaluable to you and your education program? Please take it from a converted doubter! It can.

Cindy Seitz
Diocese of Dallas, Texas

Formation Scenarios

There is no single best way that an association is formed. Each has its own story of its beginning, its own particular growing pains and joys. This section provides "real-life" stories of three associations, their beginnings and some changes/adaptations they have made along the way. This is a selection from among the many. Though they are not representative, they do reflect the broad range of choices that associations have made as they began. Following the three association stories, a listing of the kinds of activities that associations offer is provided.

ASSOCIATION #1: Cincinnati Religious Educators Association

In Cincinnati, Ohio, the CREA (Cincinnati Religious Educators Association) began in 1980. In this diocese, the total Catholic population is about half a million people, worshipping in 254 parishes. The CREA was formed when 15 DREs from one area of the diocese began to meet regularly to support one another. Eventually, with the encouragement of the diocesan office, this group invited all the DREs in the area to become part of the group. Within a short time, the association was formed. A needs-assessment was sent to all potential members. A constitution was adopted in the summer of 1980. The purpose of the CREA was to provide DREs the opportunity to meet monthly as a personal and professional support group, to foster growth, and to share information.

Membership in the CREA is open to those persons who are employed as religious education administrators, or those who were previously employed as religious education administrators and who are now working in fields affiliated with religious education. A chairperson and secretary/treasurer are elected from the membership. The leadership group includes the officers, along with a representative of the diocesan office and a committee of three persons elected from the membership. The leadership group meets monthly. A retreat is held in August and a professional day for all membership is held every March.

ASSOCIATION #2: Association of Directors & Coordinators of Religious Education & Youth Ministry (ADE), Diocese of Galveston-Houston, Texas

The diocese of Galveston-Houston includes approximately 300,000 Catholics worshipping in 144 parishes. In the last 10-20 years, the diocese has experienced rapid growth among the immigrant population. Many of these people come from central America and Southeast Asia. By the year 2000, the population of the diocese is predicted to be just over 50% Hispanic.

ADE formally became an association in 1980. In August 1979, several DREs were asked during a diocesan DRE gathering to consider forming an association. Beginning from the grassroots, and with the encouragement of the diocesan office, six DREs planned a gathering. After about three months of planning, a gathering was held to ask potential membership what specific concerns and needs they had for an association. At the end of that initial gathering, an advisory committee was formed whose task was to develop guidelines for the association. Initially these guidelines were flexible as the association determined its needs and the needs of DREs in the diocese. A formal constitution and by-laws were adopted after several years. In 1982, the association opened its membership to coordinators of youth ministry. The diocesan office is supportive but the association is independent. Liaison relationships exist between ADE and the diocesan offices for catechesis and youth ministry.

Membership in ADE is open to any active or former DRE/CYM or associate, either full or part time, who is qualified by experience, education or both. Initially the leadership body was called an executive committee, and it was composed of a president, vice-president and treasurer and several at large representatives. Presently, its leadership body is called a Coordinating Committee and includes a president, vice-president, two elected representatives from each of four vicariates, a past-president, and liaison with the diocesan Continuing Christian Education Office and the Office of Youth Ministry. The Coordinating Commit-

tee meets monthly. Meetings are open to all members. In addition, ADE sponsors an annual retreat, and several workshops per year. An annual meeting is held every spring. Some ADE workshops are cosponsored with diocesan offices.

ASSOCIATION #3: WEST CLUSTER DREs, DIOCESE OF BROOKLYN

This is an informal association of local DREs who meet monthly to offer support to each other by sharing experiences and resources. The impetus for this informal sharing was the need for mutual support on the part of the DREs who participate. The West Cluster is demographically diverse and is struggling economically. Members of the West Cluster group are actively involved with diocesan level activities. They attend vicariate meetings, and at least one member serves on the Diocesan DRE Advisory Committee. Membership is small - usually about 7-8 regular attendees. A handful of others come occasionally. Leadership for this informal group rotates among the membership. The person who hosts the meeting gathers the agenda and runs the meeting. In addition to sharing resources and ideas, the group has sponsored retreat days, workshops and convocations for catechists. They also team-teach catechist courses.

Sample Activities of Associations

- Newsletter articles on professional growth
- Directory of retreat houses/Spiritual Formation opportunities
- Interfaith Institute
- National Speakers at workshops
- DRE Convention
- Newsletters
- Scholarships to training programs
- Retreats
- Area Support Groups
- In conjunction with local colleges and universities, information about certification and degree programs
- Guidelines for salaries, benefits, job descriptions, contracts, working conditions
- Buddy Systems for new DREs
- Liaison relationships with diocesan offices, Boards of Education, Presbyteral councils
- Mediating on behalf of DREs in difficult situations
- Joint projects with seminaries on pastoral formation and other issues
- Coordinate diocesan group memberships to national associations of religious educators
- Research on DRE issues

APPENDIX THREE

Q OF LEADE ERSONS

Leaders are people with a vision of what can be, and who have the ability to encourage others to participate in that vision. The following list represents other qualities that leaders of associations may need.

A Person of Vision—

Vision, visionary, prophetic - sees beyond the now
Courageous vision
Broad vision of the Church
Person of vision and hope

A Person of Prayer—

Prayerful
Personal relationship with Jesus Christ
Person of depth and prayer
Gospel simplicity
Reliance on the Lord
Spirituality

A Person Who Values the Association—

See value in the association
Present and faithful to and at general gatherings
Experience and time for meetings
Effective member of the leadership body

Relational Qualities—

Enabler of others
Listens yet able to make decisions
Able to take initiative and empower others
Enthusiastic and able to communicate enthusiasm
Gentle organizer

Assertive, not aggressive
Sensitive to the needs of all
Cooperative
Ability to listen and to hear what others are saying
Ability to organize and articulate point of discussion
Patient facilitator
Friendly, outgoing
Open
Personable
Personal listener
Humble - willing to share and learn from others
Collaborates with others

Ministerial Qualities—

Commitment to creative ministry
Organized
Ability to articulate needs
Able to help solve problems
Able to get things done
Good organization/public speaking skills
Planner
Expertise in communication
Able to motivate, coordinate, delegate
Stability at work
Knowledgeable about basic issues facing DREs
Experience in religious education ministry

APPENDIX FOUR

INSTALLATION OF LEADERS RITUAL

1. The installation takes place during a liturgy, after the homily.
2. Leaders join in the entrance procession led by cross and Paschal candle.
3. Oil should be applied liberally (and not wiped off).
4. Olive oil mixed with perfume is used for the anointing.

ANOINTING FOR SERVICE

Lector: (The following may or may not be read aloud.)
BLESSED OIL IS A REMINDER OF THE ANOINTING WITH CHRISM THAT TOOK PLACE IN BAPTISM AND CONFIRMATION. IN ANOINTING THE LEADERS OF_____ AS PART OF THE INSTALLATION RITUAL, WE ARE CLEARLY SIGNING THAT THEY ACT BY REASON OF THEIR INCORPORATION INTO CHRIST THROUGH BAPTISM AND CONFIRMATION, AND WE REMIND THEM AND ALL PRESENT THAT THEY "WHO WOULD BE FIRST AMONG YOU MUST BE THE SERVANT OF ALL."

PRESENTATION OF THE LEADERS

Lector:
THE FOLLOWING MEMBERS OF THE _____HAVE BEEN CALLED BY THEIR ASSOCIATE MEMBERS TO A PARTICULAR MINISTRY OF LEADERSHIP AND SERVICE WITHIN THE ASSOCIATION. AS EACH LEADER IS CALLED BY NAME, PLEASE COME FORWARD

(Names of leaders are read)

QUESTIONING THE LEADERS

Bishop: DO YOU PROMISE TO ASSIST ME IN MY RESPONSIBILITY AS BISHOP AND PASTOR OF THE DIOCESE OF_____TO MAKE GOD'S KINGDOM KNOWN AND TO PREACH THE GOSPEL OF JESUS?

Leaders: WE DO.

Bishop: DO YOU PROMISE TO RESEARCH, TO SHARE, TO DISCUSS, TO QUESTION, TO PRAY AND TO DEDICATE YOURSELVES TO

PROVIDING THE NECESSARY ATMOSPHERE OF TRUST AND RAPPORT SO ALL MAY WORK TOGETHER IN TRUTH AND HARMONY?

Leaders: WE DO.

Bishop: DO YOU PROMISE TO DISCERN THE SPIRIT IN THE CHURCH AND IN THE WORLD AND TO SUPPORT YOUR CO-LEADERS AND WORKERS WHETHER LAY OR CLERICAL, MALE OR FEMALE?

Leaders: WE DO.

Bishop: THANKS BE TO GOD.

BLESSING OF THE OIL

Bishop: LET US PRAY. LORD GOD, LOVING FATHER, HEAR US AS WE PRAY TO YOU IN FAITH, AND SEND THE HOLY SPIRIT UPON US. BLESS + THIS OIL WHICH NATURE HAS PROVIDED TO SERVE THE NEEDS OF ALL, THAT IT MAY BE A FITTING REMINDER OF OUR BAPTISM. MAY YOUR BLESSING COME UPON ALL WHO ARE ANOINTED WITH THIS OIL THAT THEY MAY LEARN TO SERVE RATHER THAN BE SERVED. WE ASK THIS, FATHER, IN THE NAME OF OUR LORD JESUS CHRIST, WHO LIVES AND REIGNS WITH YOU AND THE HOLY SPIRIT FOR EVER AND EVER.

All: AMEN.

SIGNING WITH OIL

(Each leader approaches the Bishop. The Bishop anoints each leader with oil in the sign of the cross.)

Bishop: THROUGH THIS HOLY ANOINTING, MAY GOD HELP YOU SERVE US IN ALL YOU DO AND SAY. IN THE NAME OF THE FATHER, AND OF THE SON AND OF THE HOLY SPIRIT.

Leaders: AMEN.

COMMISSIONING PRAYER

Bishop: (With extended hands)
LORD, YOU TOLD YOUR DISCIPLES, "HE WHO WOULD BE FIRST AMONG YOU MUST BE THE SERVANT OF ALL". ENLIGHTEN THESE (WOMEN AND/OR MEN) WHO HAVE ANSWERED YOUR CALL TO SERVICE. HELP THEM TO YOUR TRUTH. HELP THEM TO RENEW THEIR LIVES AND ELIMINATE THE DIFFICULTIES AND OBSTACLES WHICH THEY WILL HAVE TO FACE IN THEIR DUTIES. THANK YOU, DIVINE SPIRIT, FOR THE GIFTS WITH WHICH YOU HAVE BLESSED US, AND FOR THE IMPORTANT TASK UNDERTAKEN TODAY. GUARD US AND GUIDE US AS WE BEGIN OUR TASK TODAY.

All: AMEN.

This ritual was originally designed by DREs in the Archdiocese of Baltimore, MD.

APPENDIX FIVE

ASSO[illegible] INC.

Patricia S. Davidson

Forming a local, statewide or provincial organization of DRES is exciting and rewarding work. Gathering together is helpful to individuals who share common joys and woes. The Ohio Directors of Religious Education Organization (ODREO) have provided the following list of helpful hints for associations to consider in deciding about the "business" side of managing association changes.

1. Buy or borrow the book, *STARTING AND MANAGING A NONPROFIT ORGANIZATION: A LEGAL GUIDE*, by Bruce R. Hopkins. (John Wiley & Sons, New York, 1989, ISBN 0-471-61711-3.) No matter how simple an organization is, this book can provide useful information about a variety of topics, from soliciting donations to planning conventions.
2. See an attorney. This should not be any attorney; the friend of a parishioner who might donate services may not be the answer. The attorney selected should be one who specializes in non-profit organizations. Show the attorney a draft of the association constitution. Discuss various tax and legal outcomes.
3. Rewrite the constitution. After step #2 above, some suggestions about favorable tax rulings, benefits of non-profit status, etc. may need to be incorporated into the constitution.
4. Contact the IRS for an SS-4 form. This form is necessary when applying for an Employer Identification Number (EIN). This number is needed for opening checking accounts at banks. The number prevents a member from having to declare interest income from the account on his or her individual tax return. Another advantage to having an EIN is that the group can use the number to make tax-exempt purchases, if the group qualifies for tax exemption under the laws of the state.
5. Open a checking account in the name of the association. Groups in the formation process sometimes keep money in personal checking or savings account, or a parish account. This is unprofessional and might lead to problems. See #4 above.
6. Incorporate as a non-profit organization under the laws of the state. An attorney is helpful in this process. Incorporation is necessary to protect the association from liability. When a group sponsors a workshop, for example, if someone should fall and be injured, if the group is not incorporated, each person in the leadership group can be held personally liable for damages. If the group is incorporated, it can be held liable only for the amount of money held in the association checking account.

7. Contact the IRS for recognition of tax exempt status under Section 501 (c)(6) or Section 501 (c)(3). An exemption under Section 501 (c)(3) states that the association work furthers the public interest, that the organization is exempt from income taxes, and that donations to the organization are tax deductible for the donor. Exemption under Section 501 (c)(6) means that the organization is exempt from paying income taxes, but donations are not tax deductible. In order to obtain the more favorable ruling, the constitution has to be written to show that activities further public interest.

   Two cautions:

   A. There is a difference between the tax exempt status discussed here, and tax exemption for purchases discussed in Step #4 above. This section refers to paying taxes on income from the association; it has nothing to do with purchases made.

   B. The association leadership will need to decide whether to undertake this process. If the IRS decision grants only a Section 501 (c)(6) ruling, it may not be worth the effort. Organizations with a gross annual income of less than $25,000 are exempt from filing income tax anyway.

8. Keep accurate financial reports from the very first year. The report should include number of members, the amount charged for dues, the total income from dues, total income from other sources, expenses, balances, etc. Make it as detailed as possible and keep all receipts.
9. Keep a copy of **everything**. Most DREs already know this.

APPENDIX SIX

INTERO[illegible]TIONAL EVAL[illegible]N AND COMMITMENT

There are many levels of associations to consider. Associations can occur at local, regional, state, or national levels. Local associations are called to evaluate these other levels, and the other levels also assess the degree of relationship that is desirable. This evaluation determines whether a relationship will be developed and the amount and kind of commitment that the relationship will involve.

Developing Relationships

The following questions can be used when an association needs to evaluate a new relationship with another group:

1. What will be the role of each group in this relationship? Supported? Cooperator? Liaison between each? Liaison from one to the other but not vice versa? Representatives between the two?
2. How much influence will each group have with regard to the other? How will this influence be exerted?
3. What are the goals of each group? Are these the real goals? Are the goals of one group goals that can be supported by the other? Can the goals (or some goals) of each be met through this relationship?
4. Are there activities of one group in which the other should be involved? Are these activities worth the time required for involvement?
5. How will a relationship between the groups be rewarding? Who will benefit from this relationship?

In establishing relationships with other groups, associations should develop specific answers to the above questions. Sometimes evaluation can take place by bringing the two groups together for some type of activity. As much as is possible, associations should strive for equal status relationships. If the groups considering a relationship have a competitive or

negative past history with each other, a visioning exercise might be used to overcome distortions between the groups' perceptions of each other. Below is one such script.

As you know, we have a competitive (negative) relationship with _____. For the next few moments, we are going to evaluate the images that govern our thinking and action in reference to this group. As much as possible, free up your images. (Pause) You are now ready to recognize and amend your images of _____ so that we can evaluate our relationship with them. To do so, old and obsolete images must be corrected and new images fashioned. (Pause) Remember to take good mental notes of your impressions, as we will use these to build new mental models of our relationship to _____.(Pause)

Take a moment now to travel back in your memory. Review past occasions when you have met members of _____. Think about the different individuals in the group. (Pause) Take a moment to review occasions when you have had positive relationships with these members as individuals. (Pause) Review your impressions of the individuals in the group. What are some of the positive and negative impressions that come to mind about these individuals? (Pause) Don't edit your thinking. Let your impressions come freely. That's good. Now, as you recollect individual impressions, how does this alter your mental model of that group? (Pause)

Now let's take a moment to envision how the members of_____are similar to us. What likenesses in thinking and behavior do we share with individuals in that group? (pause) Now make a mental list of these as you review your images of _____members as individuals. (Pause) Now take a moment to review the fit between your current images of this group and your past impressions of group members. (Pause). Now take another moment to review your current impressions and images of the individuals in_____. (Pause) How accurate are these images and impressions? (Pause) Where there are inaccuracies, how did they develop? (Pause) How can you alter your impressions of_____members so that we have grounds for resolving our current differences? How do negative or inaccurate images contribute to the problems we are now experiencing with _____?

This script may be altered to fit an association's particular situations. The point is that it can be used to help minimize distortions and emphasize likenesses. Ideally both groups would do the exercise, and then meet together to discuss collective impressions. This has the effect of solidifying the new common ground upon which to base a new relationship.

A second visioning exercise can be used to change the current status of interaction between groups that are already in relationship.

We are going to experience a trip into the future. You are on a spacecraft traveling to Mars for the first missionary landing of men and women on the planet's surface. (Pause) Imagine that members of the crew include your own association and members of _____. (Pause) In order for the mission to be successful, there must be mutual cooperation between the groups even though goals and values may be different. (Pause) Think about the members of_____. How are their goals and values like and unlike your associations' values and goals? (Pause) How are their actions and strategies like and unlike your own association's strategies for reaching goals? (Pause) Be certain to take good mental notes of your impressions as you imagine yourself working with _____on your mission. (Longer pause) Imagine now that the interdependency of the groups determines the success or failure of the mission. (Pause) While you do have differences, you must forge a link of cooperation to achieve the mission and to survive. (Pause) In your own mind, what would you do to change your current interactions with ____to ensure that cooperation replaces competitiveness? (Pause) How would you positively manage existing and emerging tensions that undermine interdependency. (Pause) What kind of new relationships would be

necessary if your mutual goal is to be achieved? (Pause) What kinds of tactics and methods would you use on this mission to ensure the development of greater cooperation between yourselves and_____? (Pause) What strategies can be used to help the two groups cope with conflicts and crises that arise? (Pause) Open your thinking. Allow good ideas to come forward.

Committing to the New Relationship

Once the evaluation has concluded, it is necessary for the two groups to make a commitment to the relationship. This commitment can be one of mutual support, mutual cooperation, or any other defined relationship. It is important that the commitment be stated in terms of actions implied by the relationship. For example, the groups will share resources or the groups will exert efforts on behalf of a specific activity. In cooperative relationships, commitments are reciprocal. While they may not be identical, they are of the same quality.

Following an association's committing to a relationship with another group, some formal acknowledgement of the relationship needs to be made. This involves a public declaration which includes the answers to the questions posed in the evaluation section. It also includes a description of the conditions of commitment between the two groups.

REFERENCES

Friedman, E. H. (1985). *Generation to generation: Family process in church and synagogue.* New York: Guilford Press.

Hopkins, B.R. (1989). *Starting and managing a nonprofit organization: A legal guide.* New York: John Wiley & Sons.

McKinley, J. (1965). Participation training for adult education. St. Louis: Bethany Press.

Myers, I.B. & McCaulley, M.H. (1985). *A guide to the development and use of the Myers-Briggs Type Indicator.* Palo Alto CA: Consulting Psychologists Press.

Tannen, D. (1990). *You just don't understand: Women and men in conversation.* New York: Wm. Morrow & Co.

Tracy, D. (1981). *Christian theology and the culture of pluralism.* New York: Crossroads.

Whitehead, J. & Whitehead, E. (1982). *Community of faith: Models and strategies for building Christian community.* New York: Seabury Press.

RELIGIOUS EDUCATION PUBLICATIONS

ORDER FORM

Quantity Amount

_____ $_____ **Religious Education and the Law: A Handbook for Parish Catechetical Leaders** by Sr. Mary Angela Shaughnessy. 1996. 152pp. $12member/$16 nonmember

_____ $_____ **Religious Education and the Law: A Catechist Handbook*** by Sr. Mary Angela Shaughnessy. 1996. 56pp. (Each pack includes 10 handbooks)

_____ $_____ 1-4 packs $20 each pack member/$26 nonmember

_____ $_____ 5-8 packs $19 each pack member/$25 nonmember

_____ $_____ 9 or more $18 each pack member/$24 nonmember

_____ $_____ single copy $ 5 member/$6.60 nonmember

**The Catechist Handbook is designed to be given to catechists, substitutes, aides, board members, etc., for their reference during the year. It addresses the same legal issues as the* Handbook for Parish Catechetical Leaders. *Done in summary form, it highlights the catechist's role and responsibilities.*

_____ $_____ **Gathering Together A Guidebook for Forming and Developing Associations.** 1996. 45pp. $9 NCEA member/$12 nonmember

_____ $_____ **The Third Millennium: A Catholic Perspective** by James P. Campbell, D.M. 1996. 76pp. $8 member/$10.60 nonmember

_____ $_____ **Making Commissions Work: A Handbook for Parish Religious Education Boards/Commissions,** edited by Maria Thornton McClain. 1996. 104pp. $15 member/$20 nonmember

_____ $_____ **A Primer on Law for DREs and Youth Ministers** by Sr. Mary Angela Shaughnessy. 64pp. 1992. $5 member/$6.60 nonmember

_____ $_____ **Pathways of Faith: The Story of Today's DREs** - Video Cassette. 1994. 14 minutes. $14.95 member/$19.95 nonmember

_____ $_____ **TOTAL**

Mail: NCEA Publication Sales
1077 30th St.,NW, Suite 100
Washington DC 20008-3852

Tele: 202-337-6232
FAX: 202-333-6706

_____Payment enclosed. (No charge for shipping and handling.)

_____Bill me. Minimum order $25. Shipping charges will be added.

Name _____

Parish/School _____

Address _____

City _____ State _____ Zip _____

Tele: (_____) _____

National Catholic Educational Association
1077 30th Street, NW
Suite 100
Washington, DC 20007-3852

BEST COPY AVAILABLE